

Add an Endpoint/Role for a User in OTCnet

To add an **endpoint/role** for OTCnet User, complete the following steps:

1. From the **OTCnet Home page>Administration>Manage Users>Manage OTCnet Users** screen, select the **Search User Directory** button.
2. In the search field, type user **email address** as shown in Figure 1.
3. Under **Manage User Account**, select **View Account**.

Figure 1: Search User Directory Screen

Location: Home > Administration > Manage Users > Manage OTCnet Users

Search User Directory Manage OTCnet Users Home

Search: X

Displaying 1-1 of 1 results

Manage User Account	Name	Email	HLO
View Account	Cassandra Caine	caine.cassandra@wenterprises.com	HLO1 HLO2 HLO3

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4. The **Manage User Account** screen displays as shown in Figure 2.
5. Review the read-only information. Select the **Add Endpoint/Role** button.

Figure 2: Manage User Account Screen

Administration | Reports

Manage Users Auth

Location: Home > Administration > Manage Users > Manage OTCnet Users

Manage User Account Manage OTCnet Users Home

Richard Grayson

Email Address:

HLO(s):

[Add Endpoint/Role](#) Remove Endpoint/Role

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6. The **Add Endpoint/Role** screen displays as show in Figure 3.
7. Select a **role** from the **Choose a Role** dropdown choosing from the options provisioned for the specific OTCnet user. Then select the associated **level(s)** from the dropdown options

(each one is based on the previous selection and may be prepopulated). There can be many levels to select depending on the HLO/endpoint hierarchy.



Application Tip

- As needed, add another **role** by selecting the **Add Another Role** link, and then select a different role and associated level(s) from the dropdown options.
- You are allowed to select up to 3 roles at a time. To add any additional roles, you must repeat the process by submitting a new request.

8. Select the **Submit** button to submit your request.

Figure 3: Add Endpoint/Role Screen

The screenshot displays the 'Manage User Account' interface for Richard Grayson. Below the user profile, there is a section titled 'Add Endpoint/Role'. This section contains a form with four dropdown menus: 'Choose a Role' (set to 'Check Capture Administrator'), 'Level 1' (set to 'All Federal Agencies'), 'Level 2' (set to 'Wayne Enterprises'), and 'Level 3' (set to 'GC - Gotham City Research and Develop Lab - #####'). A red rectangular box highlights these four dropdown menus. To the right of the form, there are 'Submit' and 'Cancel' buttons, with the 'Submit' button also highlighted by a red rectangular box. Above the form, there are 'Add Endpoint/Role' and 'Remove Endpoint/Role' buttons. The footer of the page includes the Bureau of the Fiscal Service logo and links for Rules of Behavior, Privacy Statement, Accessibility Statement, Contact, Test Version, and About.

9. The confirmation page after submitting an endpoint/role request and it is awaiting approval appears as shown in Figure 4.

10. Select the **OK** button to return to the **Manage OTCnet Users** screen.

Figure 4: Confirmation Screen on Adding Endpoint/Role Request Submitted

Manage User Account

Confirmation

Your request has been submitted, and it is awaiting approval. You will be notified via email when it is rejected or approved.

Request Type: Access Approval

Request ID #: 307

Request Description: OTC Endpoints and roles were added to the user's account.

Requestee: Richard Grayson

Selections	
Assigned Endpoint	Assigned Role at Endpoint
CN – CaliforniaNevada	Check Capture Administrator
CN – CaliforniaNevada	Card Operator
FWS NE Regl Ofc	Check Capture Operator
FWS Valley Stream	Check Capture Operator

Time Submitted: Sept 20, 2022 2:30 PM EDT

OK

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**Application Tip**

You will be notified via e-mail when the request is approved or rejected.